

AI+ Microsoft 365 Copilot HR Specialty (1 Days)

Program Detailed Curriculum



Executive Summary

The AI+ Microsoft 365 Copilot in HR certification is designed to equip HR professionals with the skills to leverage AI and automation tools within Microsoft 365 to enhance human resources processes. This certification covers practical applications of AI-driven features in Microsoft 365, focusing on optimizing recruitment, employee management, and performance analysis. It helps HR teams streamline workflows, improve decision-making, and drive productivity. Through hands-on training, participants will master AI tools to enhance communication, analyze data, and make data-driven HR decisions, enabling them to efficiently manage talent and foster a productive work environment.

Prerequisites :

- **Basic understanding of HR processes** – Familiarity with HR functions and workflows.
- **Microsoft 365 proficiency** – Comfortable using Microsoft 365 apps like Outlook and Teams.
- **Introductory knowledge of AI concepts** – Basic understanding of AI and automation principles.
- **Experience with HR software** – Prior experience using HR management systems.
- **Analytical mindset** – Ability to interpret and analyze HR data effectively.

Module 1

Foundations of AI & Microsoft 365 Copilot in HR

1.1 The Rise of AI in HR

- This section covers the evolution of HR from manual recordkeeping to AI-driven automation. It highlights the transformation of HR operations with the introduction of AI, particularly focusing on recruitment, onboarding, and performance management.

1.2 Meet Microsoft 365 Copilot for HR

- This module provides an overview of Microsoft 365 Copilot and its capabilities across various Microsoft apps like Word, Excel, Outlook, and Teams. It includes a case study of BrightPath HR, showcasing how Copilot helped streamline the onboarding process and improve efficiency.

1.3 Copilot & Microsoft Graph: Secure Data Use

- This section delves into how Microsoft Graph integrates with HR systems like HRIS and payroll, ensuring secure, permission-based access to sensitive HR data. It covers security protocols, compliance standards, and how Copilot works with these tools.

1.4 Intro to Ethical AI in HR

- Ethical considerations in AI, specifically addressing hiring bias and how Microsoft Copilot can help reduce it, are the focus of this module. A case study will demonstrate Copilot's role in fostering inclusive recruitment practices.

1.5 Case Study: BrightPath HR (Fictional)

- This module presents an in-depth case study of BrightPath HR, which successfully used Microsoft 365 Copilot to automate and improve its onboarding process. The case study will showcase the operational improvements in document creation time, onboarding cycle time, and overall employee satisfaction.

1.6 Hands-on Exercise (10 mins)

- In this practical exercise, participants will generate a policy summary in Microsoft Word using Copilot, simulating a real-world HR task. An interactive activity will challenge participants to match specific HR tasks with the corresponding Copilot features. The session will conclude with a mini quiz to reinforce the key concepts learned throughout the module, ensuring participants have a solid understanding of how AI and Copilot transform HR operations.

Module 2

Core Copilot Skills for Everyday HR

2.1 What is Microsoft 365 Copilot?

- This section introduces Microsoft 365 Copilot, an AI-powered assistant that integrates with common Microsoft applications such as Word, Excel, PowerPoint, Outlook, and Teams, to streamline HR tasks. Learners will understand how Copilot helps with drafting content, summarizing documents, and automating repetitive tasks.

2.2 Creating Job Descriptions with Copilot

- Here, participants will learn how to create job descriptions using Copilot. The section emphasizes drafting inclusive role descriptions, ensuring compliance with industry standards, and refining prompts for better accuracy.

2.3 Drafting Offer Letters & HR Communications

- This section focuses on using Copilot to create offer letters and HR communications. It covers how Copilot helps HR professionals maintain a professional tone in offer letters and other communication while also summarizing HR data for reports.

2.4 Onboarding Kits & Welcome Messages

- In this section, learners will discover how Copilot can assist in creating onboarding kits, checklists, and orientation packs. The focus will be on ensuring consistency across onboarding materials, including welcome emails.

2.5 Handling Sensitive HR Communications

- This section discusses how HR professionals can use Copilot to draft sensitive communications, such as policy updates and performance discussions. The content emphasizes ensuring confidentiality, empathy, and avoiding unintentional bias.

2.6 Human Review Checklist

- In this section, participants will learn the importance of human review when using Copilot for generating HR content. HR professionals must ensure that Copilot outputs comply with legal standards, maintain the appropriate tone, and protect sensitive data.

2.7 Case Study: CareersFirst (Fictional)

- This case study showcases how a fictional company, CareersFirst, tackled HR documentation challenges using Copilot. It demonstrates how Copilot helped streamline document creation, reduce document backlogs, and improve efficiency by automating document drafting and summarizing.

2.8 Hands-on Exercise (20 mins)

- In this hands-on exercise, participants will be tasked with creating an onboarding checklist and a welcome email using Copilot. The expected outputs are a completed checklist (Excel or Word) and an email draft in Outlook. This activity helps reinforce the concepts learned in the previous sections.

Module 3

Advanced Copilot Applications in Strategic HR

3.1 Automating the Recruitment Pipeline

- This section delves into automating traditional recruitment stages such as resume screening, interview scheduling, feedback summarization, and candidate shortlisting. It begins by outlining the challenges HR teams face, like time-consuming tasks and inefficiencies in manual processes. Microsoft Copilot helps streamline these stages by automating tasks and providing HR professionals with more time to focus on strategic decisions.

3.2 Summarizing Performance Reviews

- This section focuses on the challenge of synthesizing unstructured performance feedback from various sources into clear, actionable insights. Copilot aids HR and managers by consolidating feedback from multiple formats—emails, meetings, and documents—into structured summaries, saving time and ensuring consistency.

3.3 HR Meeting Automation with Teams

- This module addresses how HR teams can use Copilot to automate meeting tasks such as drafting agendas, capturing action items, and generating follow-up summaries. Copilot analyzes meeting data and related communication to automatically create agendas, reducing manual preparation.

3.4 Survey Design & Engagement Insights

- This section explores how Copilot helps HR teams design better employee engagement surveys and analyze responses faster. Copilot assists in drafting clear, neutral, and relevant survey questions, improving both response rates and the quality of feedback.

3.5 Workforce Planning with AI

- Workforce planning is a crucial aspect of HR, and this section shows how Copilot aids HR teams with predictive analytics for headcount planning, attrition forecasting, and strategic workforce allocation. Copilot helps HR analyze workforce data, identify trends, and forecast future needs.

3.6 Integrating Copilot Analytics with Power BI

- This module explains how HR teams can integrate Copilot-generated insights into Power BI for enhanced data visualization and decision-making. After summarizing data from performance reviews, surveys, and recruitment analytics, Copilot helps export these insights into Power BI for deeper analysis.

3.7 Case Study: TalentBridge (Fictional)

- This case study provides a detailed example of how TalentBridge, a fictional company, improved its recruitment process by using Microsoft Copilot. Before Copilot, TalentBridge faced significant challenges with manual resume reviews, candidate shortlisting, and leadership reporting. After implementing Copilot, recruitment cycle times were reduced by 50-60%, and HR productivity increased significantly.

3.8 Hands-on Exercise (25 mins)

- Participants will simulate a Copilot-driven recruitment process for a role, automating resume parsing, shortlisting, and candidate summary generation. This hands-on exercise allows participants to gain practical experience with the tools and understand how AI can transform the recruitment lifecycle.

Module 4

Designing HR Agents with Copilot Studio

4.1 What is Copilot Studio?

- Copilot Studio is a powerful tool that allows HR teams to design, customize, and deploy AI-powered agents and workflows seamlessly within Microsoft 365. This section introduces the platform's capabilities and outlines how HR teams can use it to automate repetitive tasks while maintaining human control.

4.2 Agent Use Cases in HR

- This section explores the different ways HR teams can utilize Copilot Studio agents, such as for answering common HR queries (e.g., leave policy, benefits support). It highlights the ease of automating employee interactions through integration with tools like Teams and SharePoint.

4.3 Building an HR Helpdesk Agent

- Learn the process of creating an HR Helpdesk Agent with Copilot Studio to handle common employee queries, such as leave balance and benefits enrollment. This section details how to design the agent's workflow, integrate it with Microsoft Teams and SharePoint, and ensure consistent answers.

4.4 Creating a Recruitment FAQ Agent

- In this section, you will learn how to create a Recruitment FAQ Agent using Copilot Studio to automate candidate-facing queries during the recruitment process. The process includes identifying common candidate questions, structuring FAQs, and connecting the agent to communication channels such as Microsoft Teams and SharePoint.

4.5 Case Study: GrowMore Inc. (Fictional)

- This case study explores how GrowMore Inc., a manufacturing company with 1,500 employees, implemented Copilot Studio agents to streamline HR operations. The company faced high HR query volume, but by using Copilot Studio, HR was able to reduce response time, automate routine queries, and focus more on strategic initiatives.

4.6 Hands-on Exercise (15 mins)

- In this practical exercise, you will design a Recruitment FAQ Agent that can answer frequently asked questions from candidates. The agent will address queries about job roles, application processes, interview timelines, and benefits packages.

Module 5

Optimizing Prompts & Integrating Copilot with HR Systems

5.1 Advanced Prompt Crafting for HR

- This section focuses on crafting context-rich prompts, ensuring HR outputs are accurate, fair, and compliant. Participants will learn to write specific prompts that align with HR goals, including performance reviews and recruitment.

5.2 HRIS Integration with Copilot

- Learners will explore integrating Microsoft 365 Copilot with HRIS platforms like Workday and BambooHR, automating HR workflows, and securely accessing real-time employee data to streamline tasks, improving efficiency and accuracy.

5.3 Case Study: WorkWell (Fictional)

- Using a healthcare services case study, participants will see how Copilot's integration helped automate leave requests, reducing approval times, enhancing HR efficiency, and improving employee satisfaction through structured workflows and governance.

5.4 Hands-on Exercise (15 mins)

- In this hands-on exercise, learners will practice refining Copilot prompts for leave approval templates. They will create safe, inclusive, and efficient prompt variations, ensuring they align with HR standards for clarity, fairness, and compliance.

Module 6

Responsible AI with Copilot —Policy, Safety & Trust

6.1 Principles in Practice

- Learn how Microsoft 365 Copilot's ethical use in HR ensures fairness, transparency, and human oversight. Real-world case studies highlight responsible AI principles in recruitment and communication for better decision-making.

6.2 Data Protection & Compliance

- Explore how Copilot supports data protection and compliance in HR by ensuring secure handling of sensitive data. Practical guidelines, real-world scenarios, and tools like Microsoft Purview help maintain legal and ethical standards.

6.3 Bias, Hallucination & Human Oversight

- Understand the risks of bias and hallucinations in AI outputs. Learn how to identify and mitigate these issues in HR workflows, with an emphasis on the critical role of human review and oversight.

6.4 Operationalizing Responsible AI

- This section covers how to integrate Responsible AI principles into daily HR practices, including policy development, workflow standardization, and the importance of clear roles and continuous monitoring to ensure ethical AI use.

Module 7

Capstone —End-to-End HR with Copilot

7.1 Project Overview and Objectives

- The capstone project allows participants to apply all the skills learned in the training program. By working on a full HR process, participants will leverage Microsoft 365 Copilot tools to automate tasks, improve workflow efficiency, and ensure responsible AI use. Participants are expected to define a real HR problem, apply Copilot to automate repetitive tasks, and document the entire workflow to showcase efficiency improvements, all while maintaining human oversight and compliance standards.

7.2 Step-by-Step Guide

- Participants will define an HR scenario, select an HR process to improve (e.g., recruitment, onboarding), and establish clear goals. With this guidance, they will create workflows that leverage Copilot across Microsoft 365 tools such as Excel, Word, Teams, and PowerPoint.

7.3 Key Takeaways and Outcomes

- Upon completing the capstone project, participants will understand how Copilot transforms HR processes across recruitment, onboarding, performance management, and employee engagement. Key outcomes include time saved through automation, improved consistency in HR documentation, and enhanced decision-making based on integrated data.

7.4 Conclusion

- The capstone project reinforces the importance of responsible AI adoption in HR, emphasizing the value of human oversight, fairness, and privacy. It also highlights the need for continuous learning in prompt engineering, workflow integration, and AI ethics.

7.5 Open-Ended Projects

- Participants are encouraged to create their own custom HR automation workflows, testing different Copilot functionalities and prompts. Through hands-on experimentation, they will develop a deeper understanding of how to adapt Copilot to real-world HR challenges, refine workflows, and ensure their outputs align with organizational goals